

BSO Tutorial for Tax Year 2009

W-2c Online

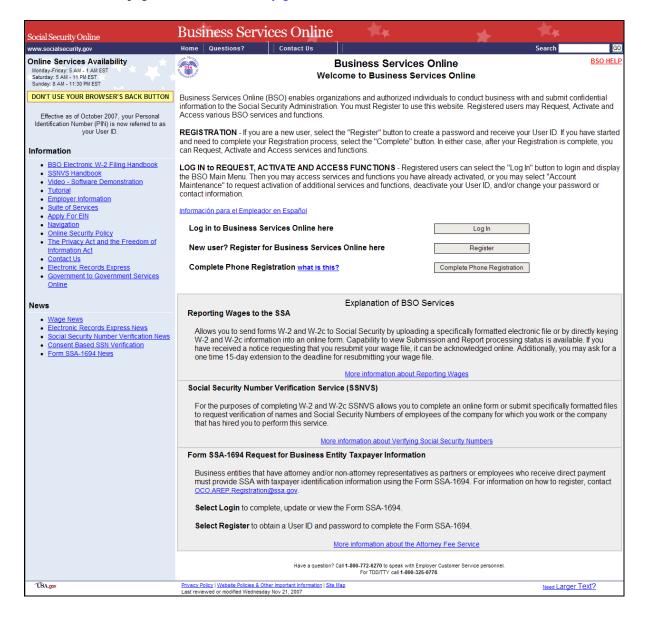
Contains the following lessons:

- Create/Resume Forms W-2c Online
- <u>Download Submitted Reports</u>

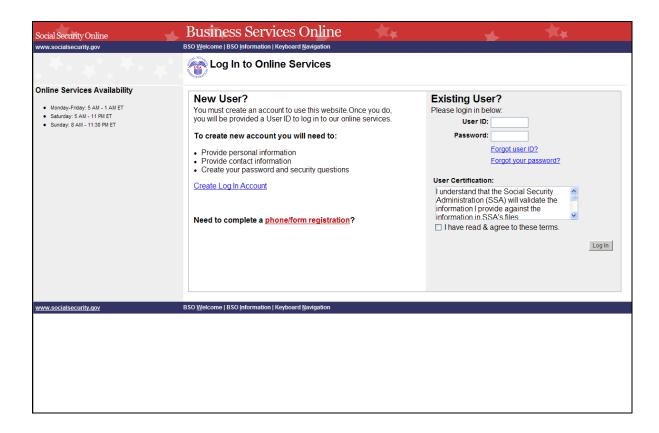
LESSON 1: CREATE/RESUME FORMS W-2C ONLINE

Follow the instructions below to create up to five (5) Forms W-2c online.

STEP 1: Point your browser to the Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



STEP 2: Select the **Log In** button on the BSO Welcome to Business Services Online page. The system displays the Log In to Online Services page.



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



STEP 5: Select the **Report Wages To Social Security** link on the BSO Main Menu page.

Report Wages To Social Security

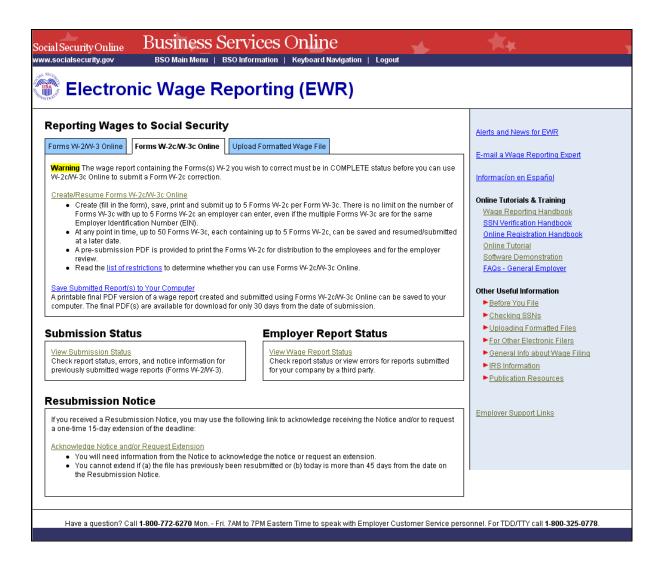
Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions The system displays the Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

To return to the BSO Main Menu page, select the I DO NOT Accept button.

The system displays the Electronic Wage Reporting (EWR) home menu page (see screen example on page 5).



STEP 7: Go to the Forms W-2c/W-3c Online tab.

Select the Create/Resume Forms W-2c/W-3 Online link.

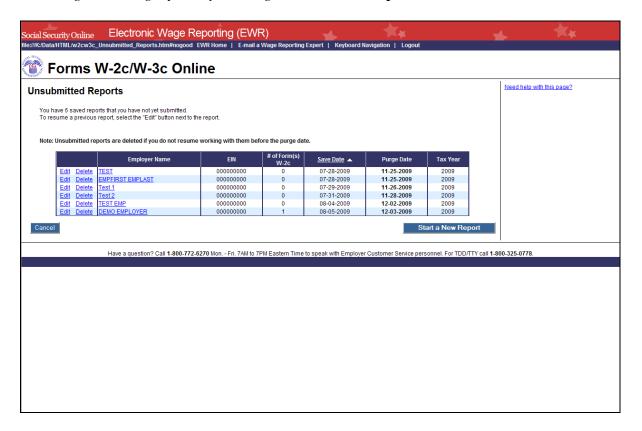
If there are no unsubmitted reports, the system displays the Before You Create Your Form(s) W-2c/W-3c page. Go to <u>Step 9</u> (see screen example on page 7).

If there are unsubmitted Forms W-2c/W-3c, the system displays the Forms W-2c/W-3c Online Unsubmitted Reports page (see screen example on page 6).



If you have any existing unsubmitted reports, the system will display the Unsubmitted Reports page. For Tax Year 2009, you may have a maximum of fifty (50) unsubmitted reports at one time. When you have reached the fifty (50) 'saved' report limit, you must first submit an existing report in order to be able to start a new report. If there are forty-nine (49) or fewer reports, you may continue without

submitting the existing reports by selecting the Start a New Report button.

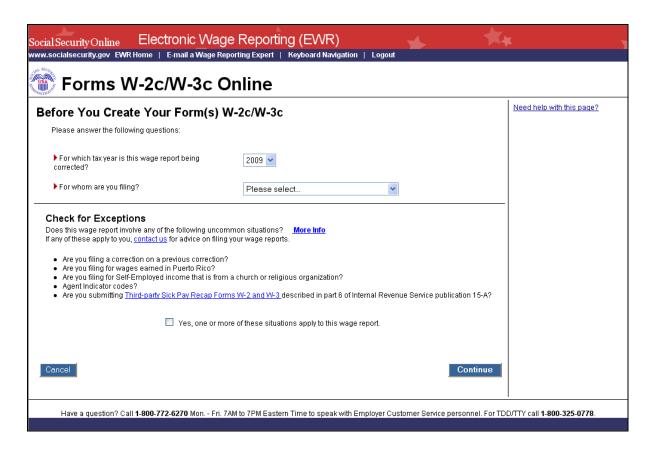


STEP 8: Select the "**Start a New Report**" button. The system displays the Before You Create Your Form(s) W-2c/W-3c page, (see screen example on page 7).

Select the **Cancel** button, if you want to go to the EWR Home page.



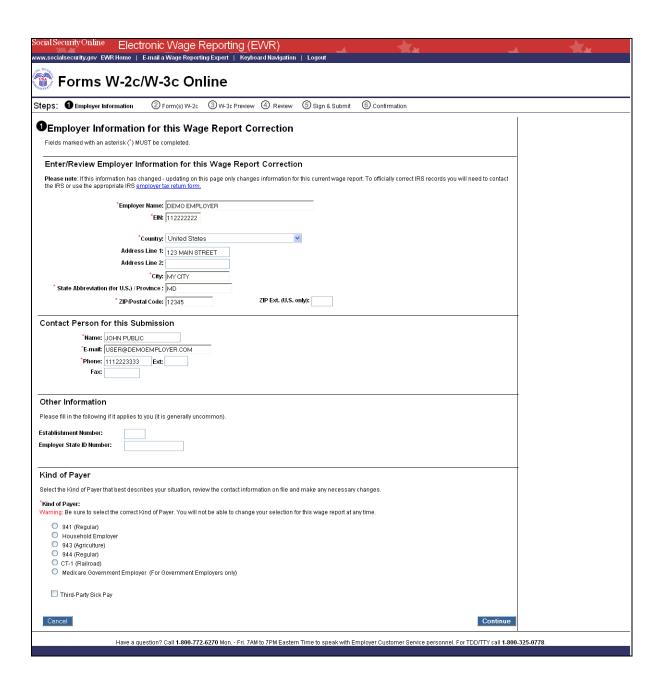
You can not submit reports marked in red (not shown here) after 4-15-2010 due to the status of limitation for report corrections. However, you may view and update them.



STEP 9: Answer the questions asked on the Before You Create Your Form(s) W-2c/W-3c page. Select a tax year from the **For which tax year is this wage report being corrected?** Dropdown. If none of the situations listed in the Check for Exception section apply, the system will display the Employer Information for this Wage Report Correction page when the Continue button is selected. (see screen example on page 9).

If any of the situations listed in the Check for Exception section apply, the system will display the W-2c Online Restrictions page when the Continue button is selected. (see screen example on page 8).

From the W-2c Online Restrictions page, select the **EWR Home Page** button to return to the EWR Home page.



STEP 10: Enter employer information, contact person information, and kind of payer information.



All fields marked with an asterisk must be completed.

page. The system displays the Enter W-2c Information page (see screen example or 11).					



STEP 11: Enter the W-2c data in the appropriate boxes.

STEP 12: You may create one or more W-2c's from the Enter W-2c Information page by selecting the following options:

Save and Start Next W-2c button to save this W-2c information and create another W-2c. The system may display some alert information after selecting this button. If an alert is displayed you may proceed by making corrections to the W-2c or by selecting the override checkbox.

When you finish creating W-2c's, select the **Save and Go to W-2c List** button to save W-2c information and proceed to the W-2c List for this Submission page (see screen example on <u>page 13</u>). The system may display some alert information after selecting this button. If an alert is displayed you may proceed by making corrections to the W-2c or by selecting the override checkbox. Go to <u>Step 14</u>.

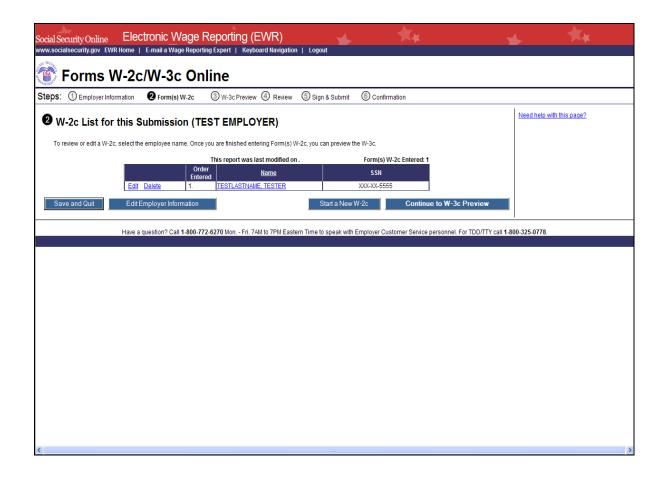


You can enter a maximum of five (5) W-2cs. The number of the current W-2c is displayed at the top of the Enter W-2c Information page. When entering your fifth W-2c, the system will no longer display the **Save and Start Next W-2c** button.

STEP 13: From the Enter W-2c Information page, you may cancel changes made to the current W-2c or delete a W-2c by selecting one of the following options:

Cancel Changes button to discard changes made to this W-2c and go to W-2c List for this Submission page.

Delete this W-2c button to delete this W-2c and go to the W-2c List for this Submission page.



STEP 14: From the W-2c List for this Submission page the following options are available:

Select the **Start a New W-2c** button to create another W-2c.

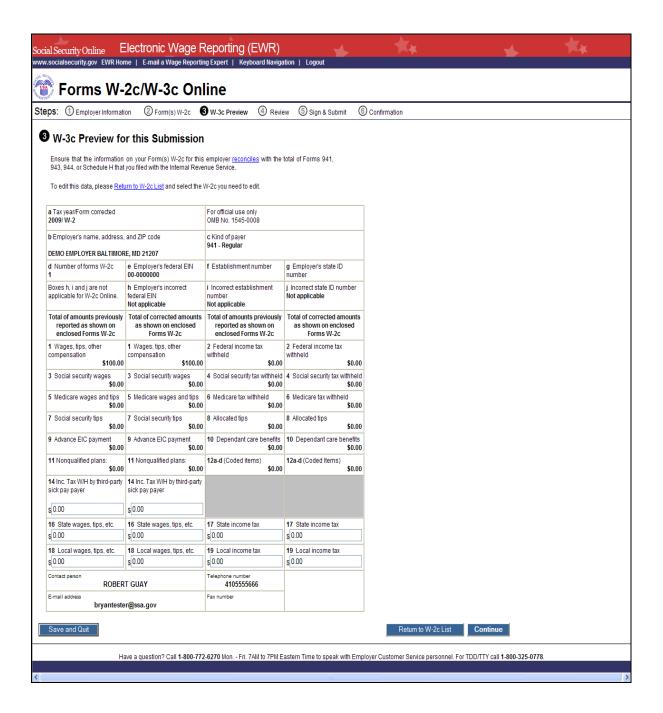
Select the **Continue to W-3c Preview** button to view W-3c Preview for this Submission page. Go to <u>Step 16</u>.

Select the **Edit Employer Information** button to change previously entered employer information.

Select the **Save and Quit** button to exit W-2c Online without submitting your wage report to the Social Security Administration (SSA). When you select this button a confirmation page will be displayed for your assistance.

From the W-2c List for this Submission page select the **Edit** link to view and edit the W-2c data. Select the **Delete** link to delete the W-2c. Whenever you select the delete link, a confirmation page will be displayed that will ask if you are sure that you want to perform that action.

STEP 15: You may enter the state or local wages and taxes totals. This information will not be used by Social Security, nor will it be forwarded to any state or local entity.

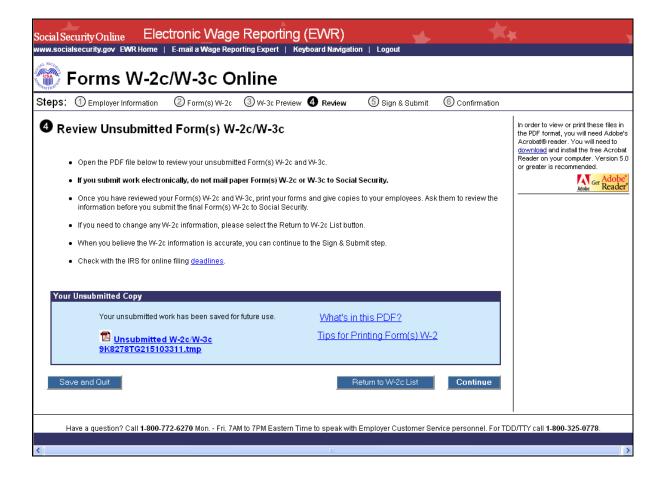


STEP 16: From the W-3c Preview for this Submission page select one of the following options:

Select the **Continue** button to go to the Review Unsubmitted Form(s) W-2c/W-3c page. Proceed to <u>Step 17</u>.

Select the **Return to W-2c List** button to return to the W-2c List for this Submission page. Return to <u>Step 14</u> for more information.

Select the **Save and Quit** button to exit W-2c Online without submitting your wage report to SSA.



STEP 17: From the Review Unsubmitted Form(s) W-2c/W-3c page, select one of the following options:

Continue button to go to the Sign and Submit page. Here you will attest to the accuracy of the report and submit it to the Social Security Administration. Proceed to Step 18.

Return to W-2c List button to return to the W-2c List for this Submission page. Return to Step 14 for more information.

Save and Quit button to exit W-2c Online without submitting your wage report to SSA.



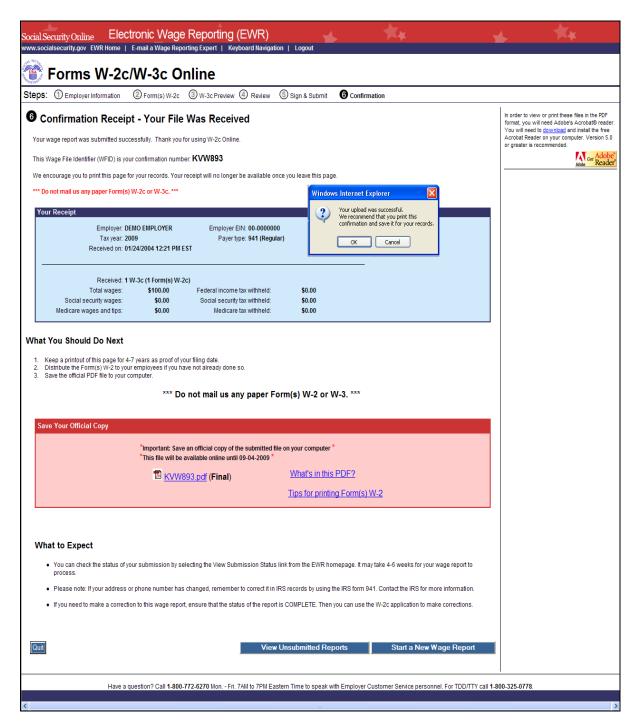
A Confirmation page, "Are you sure you want to save and exit W-2c Online without submitting your annual wage report to SSA?", will be displayed when you select the **Save** and Quit button to exit W-2c Online without submitting your wage report correction to SSA

STEP 18: Select one of the following options:

Check the "I, <name>, read and agree with the above" check box to attest, and select the Submit This Wage Report Correction button to submit your wage report correction. The system will display the Confirmation Receipt - Your File Was Received page (see screen example on page 17). Proceed to Step 19.

Save and Quit button to exit W-2c Online without submitting your wage report correction to SSA.

Previous button to return to the Review Unsubmitted Form(s) W-2c page. Return to <u>Step 17</u> for more information.



STEP 19: A print pop-up window will be displayed on top of the Confirmation Receipt - Your File Was Received page. From the print pop-up window you may select one of the following options:

Select the **OK** button to print the Confirmation Receipt - Your File Was Received page.

Select the **Cancel** button to close the pop-up window.



Your wage file will be available for you to review under your BSO account until the date displayed on your Confirmation Receipt - Your File Was Received page.

STEP 20: From the Confirmation Receipt – Your File Was Received page you may select one of the following options:

Select the **Start a New Wage Report** button to return to the Before You Create Your Form(s) W-2c/W-3c page and begin a new wage report. Return to <u>Step 9</u> for more information.

Select the **View Unsubmitted Reports** button to return to the Unsubmitted Reports page (See <u>page 6</u>). The **View Unsubmitted Reports** button only appears on the Confirmation Receipt – Your File Was Received page if there are unsubmitted reports to be viewed.

Select the **Quit** button to return to the EWR Home page.

The following file manipulation actions are also available:

- o Right-click the file link (<filename.pdf>) under the "Save Your Official Copy" heading to display a menu including the following options:
 - Select Save Target As to download the file onto your computer.
 - Select Open in New Window to view the file.
- o Double-click the Wage File Identifier (WFID) link to view the file.

STEP 21: Select the **Start a New Wage Report** button to return to the Before You Create Your Form(s) W-2c/W-3c page and begin a new wage report. Return to <u>Step 9</u> for more information.

Or, select the **Quit** button to finish reporting wages and return to the EWR Home page.

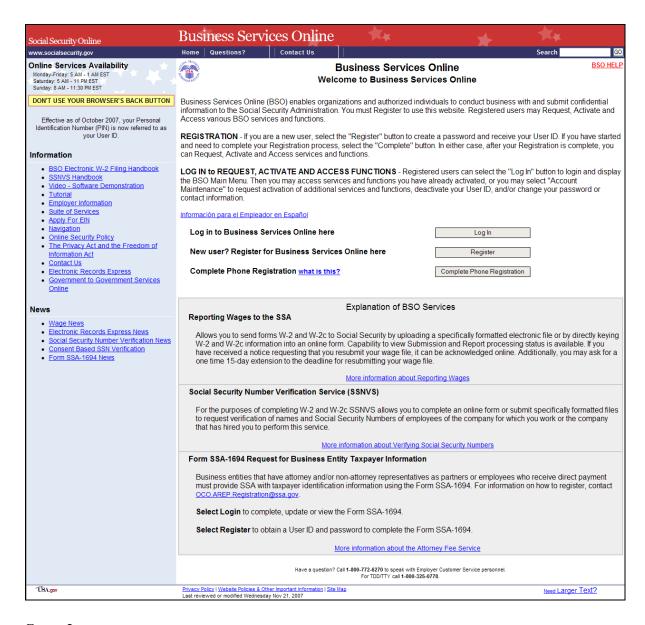
LESSON 2: DOWNLOAD SUBMITTED REPORTS

Follow the instructions below to download an Adobe file containing Forms W-2c and W-3c for a W-2c Online report submitted within the last 30 days.

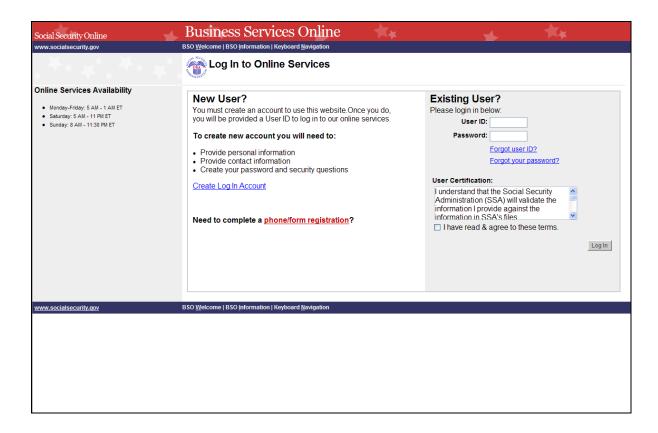


Submitted wage report files are available for 30 days or until December 31, whichever comes first.

STEP 1: Point your browser to the Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



STEP 2: Select the **Log In** button on the BSO Welcome to Business Services Online page. The system displays the Log In to Online Services page.



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



STEP 5: Select the Report Wages To Social Security link on the BSO Main Menu page.

Report Wages To Social Security

Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions The system displays the Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

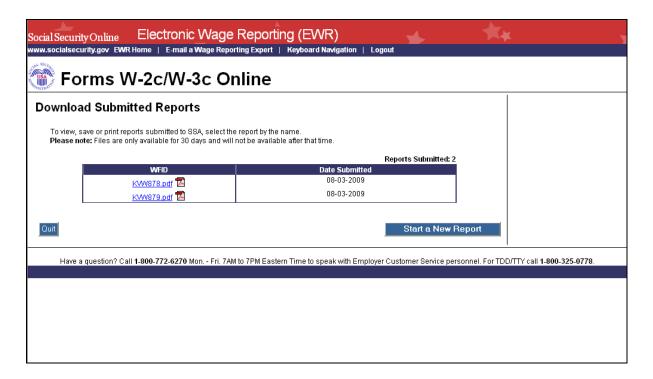
To return to the BSO Main Menu page, select the I DO NOT Accept button.

The system displays the EWR Home page (see screen example below.)



STEP 7: Select the Forms W-2c/W-3c Online tab.

Select the **Save Submitted Report(s) to Your Computer** link. The system displays the Download Submitted Reports page.



STEP 8: From the Download Submitted Reports page, the following file manipulation actions are available:

- Right-click on the Wage File Identifier (WFID) link to display a menu including the following options:
 - Select **Save Target As** to download the file onto your computer.
 - Select **Open in New Window** to view the file.
- o Double-click the Wage File Identifier (WFID) link to view the file.



Adobe Acrobat Reader is required to view your downloaded wage file. If you do not have Adobe Acrobat Reader on your computer, you can download it by pointing your browser to http://www.adobe.com.

STEP 9: In the Download Submitted Reports page you may also select one of the following options:

Start a New Report button to proceed to the Before You Create Your Form(s) W-2c/W-3c page and begin a new W-2c. See <u>Lesson 1, Step 9</u> for more information.

Quit button to return to the EWR Home page.